



PURCHASE CARD COMPUTER BASED TRAINING READ ME FIRST

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OVERVIEW

The goal of the Department of Navy eBusiness Operations Office computer based training (CBT) is to provide effective, interactive purchase card training that requires minimal computer skills. The CBT modules are role-based, targeting Heads of Activity (HA), Agency Program Coordinators (APC), Approving Officials (AO), and Cardholders. The training provides background in policy, procedures, and proper utilization of the Department of Navy Government Commercial Purchase Card (DON GCPC).

The CBT was developed under NMCI guidelines and requirements.

REQUESTS / COMMENTS

The DON eBusiness Operations Office welcomes your comments and suggestions. Should you have questions or comments on this CBT, please <mailto:DONeBusTraining@navy.mil>. Please include your full name and telephone numbers (commercial and DSN) in your message.

NOTICE

IF YOU ARE GOING TO DOWNLOAD THIS TRAINING FROM <http://www.don-ebusiness.navsup.navy.mil> SEE THE DOWNLOAD INSTRUCTIONS IN THIS DOCUMENT.

BEFORE YOU BEGIN USING THE CBT

Screen Resolution. The CBT course must be viewed using a screen resolution setting of **1024 X 768**. The CBT content is not completely visible on screens with a lower resolution setting. To reset your screen resolution, follow the directions below:

1. Locate the Display Program within your Windows Control Panel. Do this by selecting "Start", "Settings", "Control Panel" from your Windows Desktop.
2. Double-click on the "Display" program located within the Control Panel.
3. Select the "Settings" Tab, write down your current Display Setting configuration (i.e. 800 by 600 pixels, 640 by 480 pixels, etc.) located on the Desktop Slider bar Control. Change the Desktop Slider Bar control to the "1024 by 768 pixels" setting.
4. Select the "Test" button and then select "OK". [Note: if your PC does not have the "Test" button, click "Apply" then "OK", then go on to no.6.]
5. Assuming you see the test pattern correctly, select "Yes" and then "OK". If you did not see the smaller display size, contact your local administrator. Note: if your PC does not have the "Test" button, the test pattern is shown automatically as the pixel size is adjusted.
6. You may now continue with the tutorial. To change your Display Settings back to your original configuration upon completion of the tutorial, follow these instructions and substitute your original Display setting (i.e. 800 by 600 pixels, 640 by 480 pixels, etc.).

Audio. The CBT has a built in audio feature which allows the user to hear each module. The user will be prompted to check headset/speaker prior to beginning. A flashing yellow arrow will appear above the forward button after the audio has ended and there has been 7 seconds of screen inactivity.

WinZip. The CBT modules can be downloaded from www.don-ebusiness.navsup.navy.mil. Due to the large file size, the CBT modules are compressed and require decompressing before use. Once you have downloaded your training from the DON eBusiness website, use WinZIP software to decompress the file. If WinZip is not available on your PC, please contact your local system administrator.

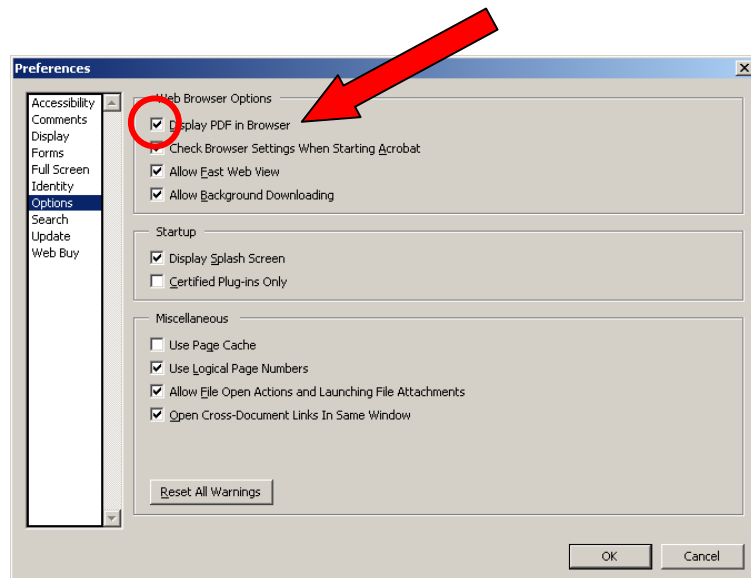
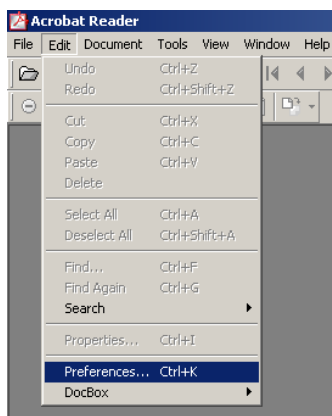


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Acrobat Reader 5.0 Settings

In order to access the Desk Guides and Instruction check the preferences in Acrobat Reader on your PC and modify them, if necessary, by doing the following:

1. Click on the Acrobat Reader 5.0 icon from your desktop
2. On the toolbar, select **Edit**,
3. Select **Preferences**,
4. Select **Options** and place a check mark in the box next to **Display PDF in Browser** by placing your mouse pointer over the box and single-click.
5. Select the OK button to process the change.



Setting Internet Explorer as your Default Browser

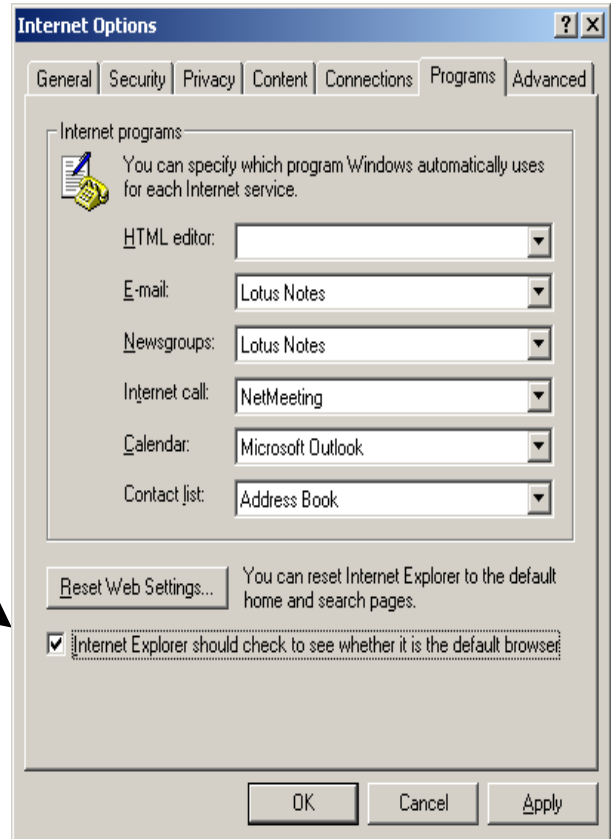
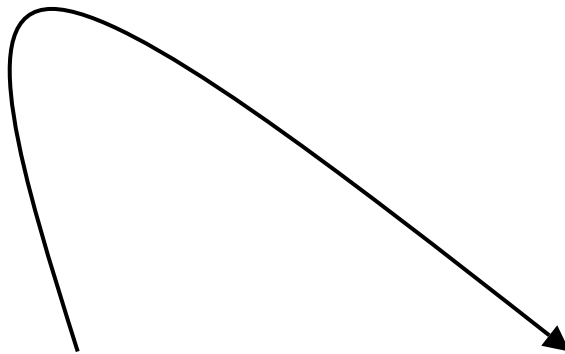
The CBT requires Internet Explorer in order to properly run the training program on your PC. If you installed another Web browser after installing Internet Explorer and Internet Tools, some of your Internet Explorer settings may have changed. You can reset your Internet Explorer settings to their original defaults, including your home page and search pages, and choice of default browser, without changing your other browser's settings by:

1. On the **Tools** menu, click **Internet Options**;
2. Click the **Programs** tab;
3. Click the **Reset Web Settings** button;



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4. Make sure a check mark is in the box before “Internet Explorer should check to see whether it is the default browser”.



IF YOU ARE NOT USING A CD-ROM FOR THIS TRAINING, ADVANCE TO THE “CREATE USER” SECTION OF THIS DOCUMENT.

CD-ROM OPERATING INSTRUCTIONS

(YOU DO NOT NEED TO DOWNLOAD THE TRAINING IF USING A CD.)

When using a CD-ROM for this training, the CD should automatically start after it is inserted into your computer's CD drive. [NOTE: Some computer systems, such as NMCI, will not permit CDs to automatically run. In such cases, open My Computer, your CD drive and then the file “PurchaseCardCD.html”.] Now, follow these steps when the “The Department of the Navy eBusiness Operations Office” screen appears.

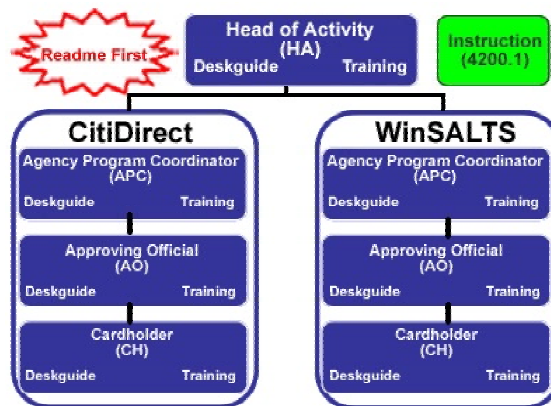
1. Move your mouse over the type of training course you want to take (Head of Activity, Agency Program Coordinator, etc.) and click on the word “Training”.
2. Click on “Open” in the File Download box. [NMCI Computers - Click the radio button located by “Run this program from its current location”, then click “OK”. Next, click “Yes” in the “Security Warning” box.] The training will now begun. Follow the training program prompts and refer to the “CREATE USER” section of this document for further information regarding the use and features of this training.



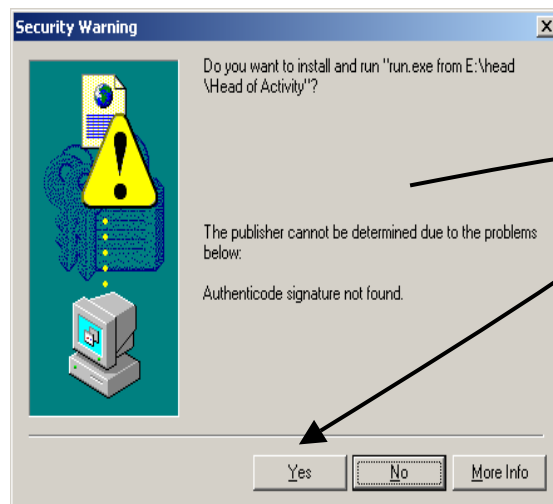
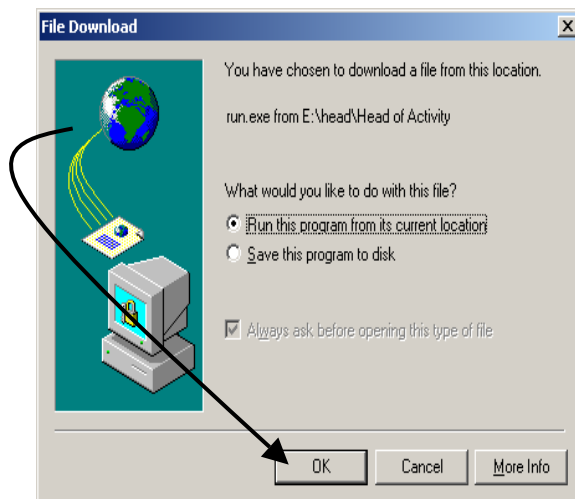
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If you experience problems when attempting to open "PurchaseCardCD.html", check the properties on "PurchaseCardCD" file (right click on mouse and click on "Properties"). To ensure that the file opens with Internet Explorer, do the following:

- click "Change" in the "PurchaseCardCD Properties" box;
- select "Internet Explorer" from the program list in the "Open With" box;
- click "OK" in the "Open With" box;
- click "Apply" in the "PurchaseCardCD Properties" box;
- click "OK" in the "Purchase Card CD Properties" box.



When you select a training module from the CD-ROM, you will be prompted to download the file. DO NOT DOWNLOAD. Instead, click on "Open" or "Run this program from its current location" in the File Download box (DO NOT save the program to disk). If you receive the Security Warning box prompting you to install and run the "run.exe...", click "Yes".





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CREATE USER / LOGIN / PROCEED WITHOUT RECORDS

Create User – You are prompted to either “Create User”, “Login”, or “Proceed without Records”.

Unless you want to audit this training, you must select “Create User” the first time you use the training in order to receive a certificate of completion. When you establish a user ID using the “Create User” feature, your learning activity is recorded or bookmarked from session to session, allowing you to stop/start the training where you left off. The training program stores your records in C:\documents and settings\my documents, in a folder named “purchase” on your hard drive.

VERY IMPORTANT: YOUR ACCOUNT MUST BE ESTABLISHED BEFORE YOU CAN PRINT A CERTIFICATE OF SUCCESSFUL COURSE COMPLETION !!

To create a user ID account, select “Create User”. The information you are required to enter is stored on your computer in a file named “userinfo.txt” in your “purchase” folder (see above under Create User). You are required to enter data in all fields, some of which will appear on your completion certificate. The required fields are:

First Name your first name
 Middle Initial your middle initial
 Last Name your last name
 SSN (last 4 digits) the last four digits of your social security number
 Rank/Grade your military rank or civilian service grade
 Email Address your official work email address
 Password alphanumeric text, 3-8 characters in length
 Password Again rekey the value keyed in Password
 Command the official name of your Command
 Your APC’s Name the name of your immediate agency program coordinator
 Your APC’s Hierarchy the level numbers (UIC) of your level 3, level 4 and level 5 APCs
 (cardholder, approving official and level 5 APC candidates may not have a level 4 APC; if in doubt, please check with your immediate APC or the person directing you to take this training – this is the person who will give you the hierarchy information)

Login: If you have previously created a user ID by selecting “Create User”, you will be prompted to enter your user ID, (the first 2 letters of your last name along with the last 4 digits of your SSN) and your password.

FORGOT YOUR PASSWORD? In the event you forget your password **you must delete** your purchase folder discussed above in “Create User”. You will then need to do Create User again. **PLEASE NOTE:** You **WILL** have to start your training from the beginning of the course if you delete the purchase folder.

Use the Tab key to move between fields.

- First Name:
- Middle Initial:
- Last Name:
- SSN (last 4 digits):
- Rank/Grade:
- Email Address:
- Password:
- Password Again:
- Command:
- Your APC's Name:
- Your APC's Hierarchy:

Level 3
Level 4
Level 5

* Required field

Your Login consists of the first two letters of your last name plus the 4-digit SSN you entered the first time you logged in.

Login:

Password:



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Proceed without Records: This option is available for individuals who want to browse the training but have no need for a certificate upon course completion. This option is useful for quick reference or as an audit tool. You WILL NOT receive a course completion certificate if you select the Proceed without Records option.

To print a certificate, you must select
Create User and set up a student account.

To proceed without records, select CONTINUE.
To set up a student account, select BACK.

BACK

CONTINUE

Tutorial: When the CBT is executed, the course automatically runs a “How To Use This Training” lesson that instructs the user on how to navigate through the CBT. The “Enter/Return” key lets you proceed through the lesson at your own pace. The “Esc” (Escape) key bypasses this lesson. You may access this lesson from the Menu roll up within any course at any time.

Certificate: Printable format available for record keeping upon 100% course completion and post-test score of 90% or greater. The user must print the certificate when prompted; otherwise, the user is required to re-take the post-test. Note: if you do not have printer connectivity, you can press the “Print Screen” button on your keyboard (next to the F12 key) and paste the image into another document to save (e.g. Word, PowerPoint) for printing at a later time.

TRAINING LOG

The CBT will prompt the user to send a training log to DONeBusinessStats@navy.mil upon successful completion of the training. The training log will be processed by the DON eBusiness Operations Office and will serve as that office’s official record of training. Copies of training certificates are to be given to each student’s appropriate Agency Program Coordinator (APC).

INSTRUCTION AND DESK GUIDES

We have taken an alternate approach to communicating Purchase Card program policy and procedures. In lieu of one document incorporating policy and operational procedures, there are two distinct documents. The first document is the DON EBUSOPSOFFINST 4200.1A instruction which provides the DON GCPC program policy. The second document is the Purchase Card Desk Guides. An extension of DON EBUSOPSOFFINST 4200.1A, the role-based desk guides contain procedural information that describe the steps involved in day-to-day purchase card operations. Each guide focuses on its role topic’s associated duties and responsibilities. By design, there is redundancy among the guides - - i.e., section 1 and the appendices appear in all---thus facilitating the access of information for each particular role. Both instruction and desk guides have the force and effect of the Department of Navy regulations regarding its DON GCPC program. These documents included on this CD-ROM. **IT IS ADVISED THAT YOU CHECK www.don-ebusiness.navsup.navy.mil PERIODICALLY FOR UPDATES TO THIS INFORMATION.** You will need Adobe Acrobat Reader, Version 5.0 or later, to properly view these PDF formatted documents. The Adobe Acrobat Reader software is free and can be downloaded from the Adobe website at <http://www.adobe.com/products/acrobat/>.

CBT MODULES

Head of Activity: This course presents the Head of Activity training with purchase card information on policies and procedures affecting the Commanding Officer and Supervisor. An introduction is followed by modules on program establishment, management controls and misuse investigations. Purchase card background and explanations of DON and Citibank policies are included. The course details the Commanding Officer and Supervisor’s role in program establishment, management, monitoring, and achieving program awareness. A post-test follows.



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Agency Program Coordinator. This course presents the APC training with purchase card information on policies and procedures. There are two versions of this course – one for CitiDirect users and one for WinSALTS users. An introduction is followed by discussion on purchase card background and explanations of DON and Citibank policies. The course details the purpose and importance of the APC's role in the purchase card program. Modules are included on purchase card responsibilities, establishing and maintaining accounts, liaison and oversight functions, program reviews and implementing and enforcing policies. A post-test follows.

Approving Official. This course presents the AO training with purchase card information on policies and procedures. It is available in two versions – one for CitiDirect users and one for WinSALTS users. An introduction is followed by discussion on purchase card background and explanations of DON and Citibank policies. The course details the purpose and importance of the AO's role in the purchase card program. The course includes modules on cardholder management, administration and record keeping and program oversight. A post-test follows.

Cardholder. This course presents the CH training with purchase card information on policies and procedures. It is available in two versions – one for CitiDirect users and one for WinSALTS users. An introduction is followed by discussion on purchase card background and explanations of DON and Citibank policies. The course includes modules on becoming a cardholder, making purchases, bank statement reconciliation, disputing questionable transactions, monitoring and documenting purchase card activity and maintaining card security. A post-test follows.

Citibank's CitiDirect Tutorials. These role-based tutorials provide insight into the CitiDirect system and its use by APCs, AOs and Cardholders. No tests or certificates are included in this training.

MINIMUM HARDWARE REQUIREMENTS

- MPC-III compliant, Pentium 133 IBM or compatible, Central Processing Unit (CPU)
- 32M RAM expandable to 192M
- 1.2 GB Hard Drive uncompressed
- High resolution SVGA color 14inch .28 dot pitch monitor
 - Vertical scan rate of 55-90 Hz
 - Horizontal scan rate of 27-79kHz
 - Bandwidth of 80Mhz
 - Set to 1024 X 768
- Super Video Graphics Adapter, PCI 64 with 2 MDRAM
- CD-ROM 6X, 600KB transfer rate
- ISA 16 Bit Sound Board, MPU 401 compliant, external stereo speakers 40Hz to 16khz frequency response. Audio recording rate 4-44.1khz stereo, playback 4-44.1khz stereo
- Mouse and keyboard
- Printer and internet/LAN connection (V.34 compatible 28.8 modem)

MINIMUM SOFTWARE REQUIREMENTS

The courseware is designed to function under Windows 95, 98, 2000 and NT operating environments. Adobe Acrobat 5.0 or greater, WinZip and Internet Explorer software is required. **To view your certificate, you must have a default printer setting even if your computer is not physically attached to a printer.**



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DOWNLOADING INSTRUCTIONS

Downloading the training may take a long time depending on your local area network connection, so please consider this when attempting to download. It is strongly recommended that you close any other programs and windows before downloading in order to help expedite the process. Another tip for west coast and Pacific users is to download as late in the workday as possible.

The next 6 steps are an example of how to download (from the DON eBusiness Operations Office website) and start the CitiDirect Approving Official training.

1. On your computer's C: drive, under Documents and Settings, create 2 folders. [NOTE: If using a NMCI computer, create these folders under your name folder in Documents and Settings---eg. C:/Documents and Settings/john.noname/.] Name one folder "Zipped" and name the other folder "Approving Official Training". If you already have folders at this location with these names, choose other names, but be sure to make a note of the names used. Close all files.
2. Open your Internet Browser (preferably using Internet Explorer) and key www.don-ebusiness.navsup.navy.mil in the URL and enter. You will receive the DON eBusiness home webpage. On the right side of the home page, click on "Purchase Card Training" under "Quick Links".
3. Find the CitiDirect Approving Official (AO) block, move your mouse over the word "Training" and click. A "File Download" window will appear. Click on the "Save" button to continue. [NOTE: If using a NMCI computer, click on "OK" after selecting the "Save this file to disk" radio button.]
4. Select the "Zipped" folder location you created in step 1 and click on "Save". Make a note of the file name being saved (HA, AOCitiDirect, APCCiti, CardholderCitiDirect, AOWinSALTS, etc.). In this case, the file name is "AOCitiDirect". Notice that while the file is being saved the number of megabytes (MB) downloading appears. After the download is complete, check for a match in the number of MB downloaded against the number of MB in the file you downloaded from. The numbers must match exactly in order to run the training. If the numbers differ, delete any file or portions downloaded and repeat the download process again until the numbers match. When the numbers match, close the "Download complete" window and the Internet Browser.
5. Open My Computer and your C: drive. Find the "Zipped" folder you created in step 1 and right-click with your mouse on "AOCitiDirect". In the pop-up box, move your mouse over "WinZip" and click on "Extract to ...". You will receive a "WinZip Extract" box that allows you to select the location in which to place the extracted file contents. Select the "Approving Official Training" folder you created in step 1 and click on "Extract". In a pop-up box, you'll see the files rapidly being extracted from the zip file. The box will close when the extract is finished. Close the "Zipped" folder. [NOTE: Your system may not have WinZip installed with the option to display this menu choice. Check with your local system administrator if you do not have WinZip or the "Extract" option.]
6. Open the "Approving Official Training" folder created in step 1. Then, open the folder named "AO_CD" (HA, APC_CD, CH_CD, AO_WS, etc. for other training modules) and click on "run" or "run.exe". You have now started the training. Repeat this step to restart the training at anytime. Follow the training program prompts and refer to the "CREATE USER" section of this document for further information regarding the use and features of this training.

[Note: If you receive a "Where is CheckSys?" pop-up box, you are running the training from the downloaded zip file (step 4 above) vice the unzipped file (step 5). In this case, end the Purchase Card Training task using your computer's Task Manager. Now, run the training program from its correct location (step 6).]

7. Delete the "AOCitiDirect" zip file in the "Zipped" folder created in step 1.